

Daily Market Monitor

March 10, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	9 March	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24028	-1.73	-7.11	2.16	6.54
BSE Sensex	77566	-1.71	-7.73	0.20	4.35
BSE 100	25190	-1.84	-7.06	2.49	7.07
BSE 200	10933	-1.86	-6.81	3.11	7.67
BSE 500	34557	-1.91	-6.89	2.91	7.32
BSE SmallCap	45781	-2.35	-8.64	-1.84	0.38
BSE MidCap	43196	-2.12	-7.43	4.01	8.29
BSE LargeCap	9305	-1.86	-6.66	3.00	7.56
Sectoral indices					
BSE IT	29192	-0.09	-15.13	-19.19	-21.52
BSE Oil & Gas	27286	-3.11	-6.57	8.57	14.49
BSE FMCG	18007	-1.49	-5.72	-7.41	-4.41
BSE Auto	57504	-3.89	-6.83	20.54	22.10
BSE Bankex	62941	-3.16	-7.58	5.71	13.40
BSE Teck	15412	-0.20	-12.57	-11.17	-11.61
BSE Capital Goods	69098	-2.15	0.09	10.16	17.29
BSE Consumer Durable	55844	-2.68	-5.85	2.69	3.46

Turnover (Rs Cr)	9 March	6 March
BSE Cash	9659	8028
NSE Cash	116596	110554
NSE F&O	20528846	15311726

Rs. Cr (Equity)	FII Inv 6 March	MF Inv 5 March	DII Inv 9 March
Buy	15,134	14,336	21,586
Sell	21,483	11,586	12,573
Net	-6,349	2,750	9,014
Net (MTD)	-21,881	18,172	41,801
Net (YTD)	-38,432	70,966	142,396

	9 March	1Day	Month ago	Year ago
USD	92.26	91.68	90.40	87.06
GBP	122.91	122.49	123.08	112.22
Euro	106.59	106.41	107.05	94.20
100 Yen	58.18	58.08	57.77	59.02

Indian markets

- Indian equity benchmarks closed lower on Monday, dragged down by rising uncertainties in the Middle East that drove up crude oil prices further.
- The top losers were Tata Motors Passenger Vehicles, UltraTech Cement, Maruti Suzuki India, Eicher Motors and Mahindra & Mahindra, down 4.44-5.27%.
- The top gainers were Wipro, Reliance Industries, Apollo Hospitals Enterprise, Infosys and HCL Technologies, up 0.42-1.64%.

Indian debt

- The interbank call-money rate ended lower at 5.07% on Monday compared to 5.15% on Friday.
- Government bond prices fell on Monday amid rising crude prices and a weaker rupee, heightening inflation concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.72% on Monday compared to 6.69% on Friday.

Indian Rupee

- The rupee closed lower against the US dollar on Monday, pressured by surging crude oil prices and foreign fund outflows.

Regulatory

- The Reserve Bank of India (RBI) injected Rs 50,000 crore into the banking system through Open Market Operation (OMO) purchases of government securities
- Sebi introduced a voluntary debit freeze facility for mutual fund investors across demat and non-demat folios to promote their digital security.

Economy and Government

- The Central Information Commission (CIC) has advised the National Financial Reporting Authority (NFRA) to place orders, directions, circulars and policy decisions affecting audit practices and standards in the public domain.
- Manipur Chief Minister Yumnam Khemchand Singh announced that a budgetary provision of Rs. 350 crores is being earmarked in the upcoming budget for assistance to those women who have been affected by recent unrest.
- Finance Minister Nirmala Sitharaman said that the medium-term impact of global crude oil price rise on inflation would depend upon several factors including exchange rate movements, global demand and supply situation, monetary policy transmission, the state of general inflation, and the extent of the indirect pass-through.
- The Finance Ministry said the impact of ongoing geopolitical clashes in West Asia and rising global crude oil prices on inflation is not estimated to be substantial at this point, given that India's inflation is near the lower bound.

Domestic Debt Market Indicators

Instrument	9 March	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.07%	5.15%	4.40%	5.20%	7.00%	5.80%
3-Month T-Bill	5.35%	5.31%	5.34%	5.25%	6.34%	6.48%
6-Month T-Bill	5.54%	5.51%	5.55%	5.44%	6.47%	6.57%
1-year T-Bill	5.63%	5.60%	5.65%	5.47%	6.40%	6.54%
3-Month CD	7.22%	7.10%	7.04%	5.95%	7.00%	7.56%
6-Month CD	7.20%	7.05%	7.12%	6.25%	7.25%	7.66%
1-year CD	6.98%	6.94%	6.98%	6.50%	7.15%	7.66%
3-Month CP	7.70%	7.60%	7.55%	6.41%	7.25%	7.81%
6-Month CP	7.60%	7.55%	7.62%	6.65%	7.55%	7.88%
1-year CP	7.30%	7.27%	7.47%	6.95%	7.45%	7.90%
1-year Gilt	5.66%	5.65%	5.73%	5.51%	6.40%	6.57%
3-year Gilt	6.13%	6.00%	6.00%	5.77%	6.44%	6.56%
5-year Gilt	6.44%	6.34%	6.52%	6.28%	6.45%	6.60%
1-year AAA	7.23%	7.13%	7.14%	6.71%	7.29%	7.57%
3-year AAA	7.28%	7.23%	7.24%	6.81%	7.11%	7.38%
5-year AAA	7.35%	7.28%	7.28%	6.88%	7.11%	7.34%
10-year G-sec	6.72%	6.69%	6.76%	6.61%	6.58%	6.69%
Net LAF (Rs Cr)	241178	247279	311006	184811	-9354	-82465
Forex reserves (\$ bn)	728.49	723.61	723.77	686.23	642.49	638.70

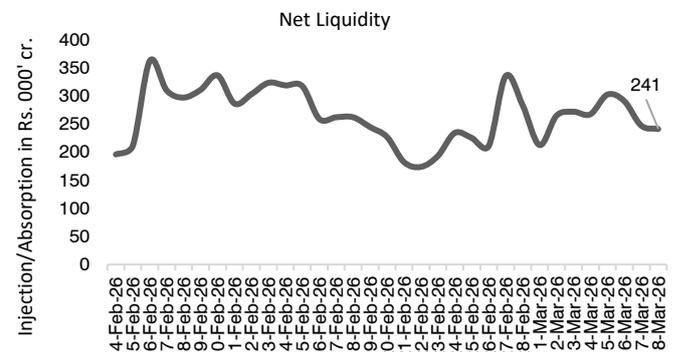
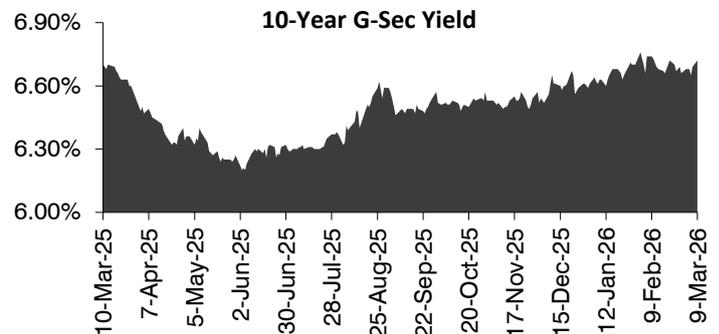
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	7.47	8.21	8.26	9.49	9.97
1 Year	5.66	7.23	7.97	8.02	9.25	9.73
3 Year	6.13	7.28	8.02	8.07	9.30	9.78
5 Year	6.44	7.35	8.19	8.24	9.47	9.95
10 Year	6.72	7.49	8.33	8.38	9.61	10.09

Rs. Cr (Debt)	FII Inv 6 March	MF Inv 5 March
Buy	353	23,372
Sell	652	29,956
Net	-298	-6,584
Net (MTD)	1,110	-13,342
Net (YTD)	-341	-197,827

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
WPI	1.81% (Jan'26)	-1.21% (Oct'25)	2.51% (Jan'25)
IIP	4.8% (Jan'26)	0.5% (Oct'25)	5.2% (Jan'25)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
India Manufacturing PMI	56.9 (Feb-26)	56.6 (Nov-25)	56.2 (Feb-26)
India Service PMI	59.3 (Jan-26)	60.9 (Sep-25)	56.5 (Jan-25)
Bank Credit Growth*	-0.43% (Feb 15, 2026)		1.56% (Jan 31, 2026)
Bank Deposit Growth*	-0.21% (Feb 15, 2026)		1.75% (Jan 31, 2026)

Capital markets

- Raymond Realty Ltd has entered a joint venture to develop a housing project in Mumbai with an estimated revenue of about Rs 3,000 crore.
- Puravankara Group signed a joint development agreement for a 4-acre land parcel on Hennur Road in Bengaluru, with an estimated gross development value (GDV) of over Rs 1,300 crore.
- Paras Defence and Space Technologies secured a significant order worth approximately Rs 80.28 crore from the Defence Research and Development Organisation.
- ABB on Monday plans to invest a further \$75 million in India during 2026 to significantly expand its manufacturing footprint and R&D capabilities.
- Tata Consultancy Services (TCS) announced the launch of a new Gemini Experience Centre in Troy, Michigan in the United States aimed at accelerating the adoption of artificial intelligence-driven solutions in the manufacturing sector.
- Reliance Retail completed the acquisition of Indian beauty and wellness brand 'Pahadi Local' along with the business of Pahadi Goodness.
- PayU partnered with checkout optimisation platform GoKwik to launch an integrated conversion-to-completion stack, addressing challenges such as checkout drop-offs, payment failures, and conversion inefficiencies.



Global market indices	9 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47740.8	0.50	-4.78	13.66	11.54
Nikkei 225	52728.72	-5.20	-6.45	48.04	42.95
FTSE	10249.52	-0.34	-1.32	19.42	18.08
Hang Seng	25408.46	-1.35	-5.99	9.90	4.86
Taiwan	32110.42	-4.43	-0.91	55.15	42.23

Global debt	9 March	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.12	4.15	4.22	4.18	4.23	4.32
UK 10-Year (%)	4.67	4.63	4.53	4.51	4.68	4.65
German 10-Year (%)	2.86	2.86	2.84	2.85	2.73	2.84
Japan 10-Year (%)	2.19	2.16	2.28	1.97	1.49	1.50

Domestic	9 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	158674	-0.05	2.45	77.96	84.38
Silver (Rs / Kg)	260056	-0.26	2.52	157.76	168.86
Aluminium (Rs / Kg)	343	2.80	9.94	36.79	29.84
Copper (Rs / kg)	1208	-1.92	-2.31	34.42	37.19
Lead (Rs / kg)	197	0.72	1.13	5.33	4.71
Zinc (Rs /Kg)	330	0.73	0.30	20.10	17.99
Nickel (Rs / kg)	1609	-0.62	1.81	13.68	13.36

Global	9 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5171.92	0.42	4.14	66.78	77.11
Silver (oz/\$)	8454.00	3.39	8.66	147.77	158.14
Brent (\$/bbl)	98.96	6.76	43.34	32.35	40.65
NYMEX crude (\$/bbl)	94.77	4.26	47.25	32.58	41.36

Global markets

- Wall Street stocks closed higher on Monday as hopes of a resolution to the Iran war, offset inflationary concerns.
- 10-year US bond yield ended lower at 4.12% as easing crude oil prices reduced inflation concerns and due to rising safe haven demand for bond amid geopolitical tension.
- FTSE index closed lower on Monday as surging crude oil prices fuelled inflation fears and raised concerns about potential interest rate hikes amid Middle East tensions.
- Asian markets were trading mostly lower at 8.30 AM.
- The Japanese economy advanced at an annualized pace of 1.3% in Q4 2025, compared to a 2.6% contraction in Q3 2025.
- Japan coincident economic index rose to 116.8 in January 2026 compared to 114.3 in December 2025 while the economic index edged up to 112.4 from 110.3.
- Japan Economy Watchers Survey index rose to 48.9 in February 2026 compared to 47.6 in January 2026 while the Economy Watchers Survey Outlook decreased to 50 from 50.10.
- Japan Household spending eased to 1% year-on-year in January 2026, compared to a 2.6% decline in December 2025.

Commodity

- Crude oil prices rose by \$3.87 to \$94.77 a barrel on the NYMEX as supply cuts by Saudi Arabia and other OPEC members during the expanding war with Iran heightened supply concerns.
- Domestic gold prices ended flat as gains due to escalating geopolitical tensions were offset by strong dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Mar 10	Japan GDP Growth Rate QoQ Final Q4	-0.6%
Mar 11	US CPI Feb	325.25
Mar 12	India Inflation Rate Feb	2.13%
Mar 13	US GDP Sales QoQ 2nd Est Q4	4.5%
Mar 16	US Industrial Production Feb	2.3%

Source: Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites
Abbreviations: FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

*Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers

	Indicators	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25
Debt Indicators	Currency in circulation (Rs billion)	39079	38512	38184	38071	38097	38147	38372	38344	37762	36997
	Repo rate	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%
	10-year G-sec yield	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%
	Call rate	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%
	Forex reserves (\$ billion; mthly. avg.)	692	688	699	701	693	698	699	689	682	656
GDP	GDP	NA	NA	7.80%				7.40%		6.40%	
	Fiscal deficit (Rs billion)	NA	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18
	IIP, %y/y	NA	6.70%	0.40%	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%
	Exports, \$ billion	NA	38.13	34.38	36.38	35.1	37.24	35.14	38.73	38.49	41.97
	Imports, \$ billion	NA	62.66	76.06	68.53	61.59	64.59	53.92	60.61	64.91	63.51
	Manufacturing PMI	55	56.6	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1
	Services PMI	59.1	59.8	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5
	GST collections (Rs crore)	174550	170276	195936	189017	186315	195735	184597	201050	236716	196141
	India crude oil import (mbpd)	NA	21.06	21.01	20.21	19.60	18.89	20.32	21.3	21.0	22.7
Sector update	Auto – Passenger vehicles	NA	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%
	Auto – Two-wheelers	NA	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%
	Auto – Commercial vehicles	NA	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%
	Auto – Tractors	NA	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%
	Infra – Coal	NA	2.10%	-8.50%	-1.20%	11.40%	12.30%	-6.80%	2.8%	3.5%	1.6%
	Infra – Electricity	NA	-2.2%	-6.9%	3.1%	4.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%
	Infra – Steel	NA	6.10%	5.90%	14.40%	13.60%	16.60%	9.70%	7.4%	4.4%	8.7%
	Infra – Cement	NA	14.50%	5.20%	5.00%	5.40%	11.60%	8.20%	9.7%	6.3%	12.2%

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